

## Finance Dashboard - My Requisitions User Guide

### Important information

- Do not combine fixed and non-fixed items on the same requisition. See [Fixed/Capital Assets](#) and [Fixed Asset Coding](#) for additional information.
- When copying and pasting text, press Ctrl+Shift+V to paste as plain text without formatting.
- Requisitions submitted without supporting documentation will not be approved.

### Part I - Gaining Access

1. Make sure you **have authorized Fund/Organization (FOAPAL) access** in Banner.

FOAPAL stands for six accounting elements of finance data in Banner: Fund, Organization, Account, Program, Activity and Location. FOAPAL authorization can also be called Fund-Organization Access. In Banner, all access to the (University and Foundation) Finance data is based on the Fund/Organization Access that has been authorized/established for an individual. **You must have Originator access on a Fund/Organization before you can create requisition.**

To request “Approver” access, submit a [FOAPAL Authorization - Approver](#) Request. This form can be used to replace approver access.

To request “Originator” or “View Only” access, submit a [FOAPAL Authorization - Originator/View](#) Request.

If necessary, you may run [Fund & Organization Access Report](#) report to check access for you or others. [What does Approver, Originator or View Access mean?](#)

2. Access Finance Dashboard **My Requisitions** Options.

From [My Missouri State](#) portal, use the **Discover** tool from the main menu and search “Finance”, select **Finance Resources** card and click on **Finance Dashboard** to start.

### My Finance



Hello Xiaomin,  
Create, edit and approve transactions and view financial information for department / organization.



**My Finance Query**  
Create, view and share budget availability, encumbrance and payroll queries.



**My Journals**  
Create and view draft, pending and completed journals and supporting documentation.



**Approve Documents**  
View list of documents pending approval. Approve, disapprove, or deny.



**Delete Finance Template**  
Delete templates for Finance Queries, Budget Development, and Purchase Orders.



**My Requisitions**  
Create and view draft, pending and completed requisitions and supporting documentation.



**Purchase Orders**  
Create purchase orders or purchase orders in process.



**Budget Development**  
Create and review fiscal year operating budgets for the budget development process.

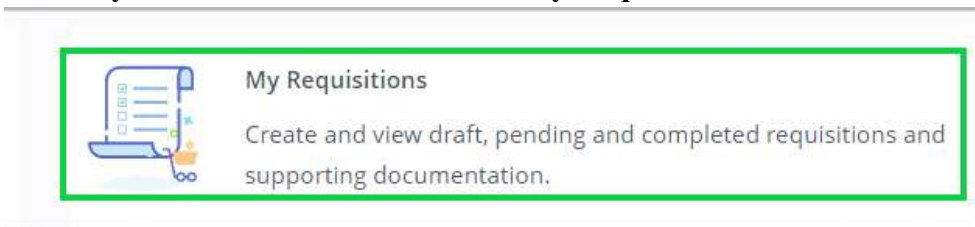


**View Document**  
View draft, pending and completed documents with related information and approval history.

## Part II - Creating a Requisition

Prepare to provide all the information required by Procurement Services to complete your request for purchase.

1. From **My Finance Dashboard** click on **My Requisition** to start.



2. On the **My Requisitions** page, click **Create Requisition**.



3. On the **Requestor Information** page, All items with a red asterisk \* are required fields.

### Transaction date

Keep the transaction date as shown unless Financial Services or Procurement Services directs you to change it. Take particular care at fiscal year-end.

### Public comment

Enter information here that should transfer to the Purchase Order.

For each line item, include the applicable information:

- A brief description of the purchase
- The quote number
- The IT ticket number
- MSU contract, cooperative contract, RFQ/RFP, SFS, or REF number
- Special handling details, such as rush processing, check pickup, or fixed-asset status
- Whether a deposit is required

### Private comment

Private comments are visible only to the originator. Procurement Services cannot see them.

### Ship To

- If no goods will be delivered, change Ship To to SRVC (Service).
- Enter the department or employee name and specific delivery location in Ship To. Bill To should identify the university or applicable affiliate, such as WP, Greenwood, KSMU, or OPT.

### Attention To

- Enter the recipient's name, building, and room number. Example: Isaac Balasundaram, CARR 106.
- For an approved prepayment of the full requisition amount, enter "Approved for Payment."

Click **Next** to continue.

My Finance • My Requisitions • Create Requisition

Create Requisition

1 Requestor Information    2 Vendor Information    3 Add Item & Accounting

Requestor \*  
Mandy - Xiaomin Zhou

Transaction Date \*    Delivery Date \*  
04/11/2024    04/11/2024

Requestor Email  
XiaominZhou@MissouriState.edu

Accounting Type : Document level

Requisition Comments

Public Comment  
Enter comments for the requisition

Private Comment  
Enter comments for the requisition

Chart \*  
U MISSOURI STATE UNIVERSITY

Organization \*  
052000 FINANCIAL SERVICES-ASST VP F&A-OPER

Ship To Location \*  
STMA

Attention To \*  
Xiaomin (Mandy) Zhou

Ship To Location  
Attention: Xiaomin (Mandy) Zhou  
Receiving Dock  
Springfield MO 65897

Back    Next

4. On the **Vendor Information** page:
- Clear the Choose vendor for me checkbox.
  - Search for the vendor by name or M-number.
  - Enter the vendor's email address, if available.
  - Leave the Currency field unchanged.

If you cannot find a vendor, contact [Procurement Services](#) to confirm if the vendor is set up in Banner with an M-Number.

Click [here](#) to find additional information on [Vendor Registration](#).

Click **Next** to continue.

1 Requestor Information    2 Vendor Information    3 Add Item & Accounting

☐ Choose vendor for me

Vendor

Ellucian Company, LP (M02953124)

ellucian

Ellucian Company, LP (M02953124)  
4375 Fair Lakes Ct Fairfax VA 22033-4234

Ellucian Support Inc. (M00048472)  
4 Country View Rd Malvern PA 19355

Ellucian Support Inc. (M00048472)  
14083 Collections Center Dr Chicago IL 60693

1 Requestor Information    **2 Vendor Information**    3 Add Item & Accounting

☐ Choose vendor for me

Vendor

Culligan of Springfield (M03558298) x v

Vendor Information

Culligan of Springfield (M03558298)  
3801 N 21st St  
Ozark MO 65721-5998

Vendor Email

Choose/Enter Email x v

Currency

Choose Currency x v

5. On the **Add Item & Accounting** page:

- Do not select ZD codes.
- Do not enter a custom commodity-code description.
- Use the Commodity Code List.

Search by item type or commodity code, then select the matching code. You can also select a code from the dropdown list.

1 Requestor Information    2 Vendor Information    **3 Add Item & Accounting**

Add Item(s)

Choose Item ^

speaker

Service-Honorarium/Speaker (SE392)

1 Requestor Information    2 Vendor Information    **3 Add Item & Accounting**

Add Item(s)

Choose Item ^

CP120

Computer-Hardware-CPU 2w+1w (CP120)

After selecting an item, complete the fields displayed for it: unit of measure, quantity, and unit price. If you do not know the unit of measure, select EA (Each).

## Commodity comments

Use **Public Comment** on the Requestor Information tab for text that must appear on the **Purchase Order**.

### For each line item, include:

- A specific description of the item or service
- The part or model number, if available
- For software and services, include the term of service

### Do not include:

- Quantity or price
- Quotation marks
- Long dashes
- Apostrophes

**Do not put Purchase Order text in Private Comment.**

Click **Save** to continue. The page refreshes and displays the item(s) you added. Select an item from the list to view or edit its details. Click **Save again** to continue.

**Repeat the item-entry steps for each additional line.**

1 Requestor Information | 2 Vendor Information | 3 Add Item & Accounting

Item Code (CP120)  
Computer-Hardware-CPU 2w+1w

Unit Of Measure \*  
EACH (EA) x v

Quantity \*  
1.00

Unit Price \*  
125.0000

(Quantity) X (Unit Price) USD 125.00

Commodity Item Total USD 125.00

Commodity Comments

Public Comment  
Enter comments for the commodity item

Private Comment  
Enter comments for the commodity item

A green message with your requisition number should appear at this point assigning the requisition number.

My Finance > My Requisitions > R0048669

R0048669 Attachments Delete Requisition

1 Requestor Information 2 Vendor Information 3 **Add Item & Accounting**

Add Item(s)

Choose Item

Commodities (2)

|                                                  |               |
|--------------------------------------------------|---------------|
| Computer-Hardware-CPU 2w*1w (CP120)              | 625.00        |
| Quantity 1.00 @ 625.0000                         | Discount 0.00 |
| Additional Charges 0.00                          | Tax 0.00      |
| Service-Information Management System 4w (SE420) | 120.00        |

Requisition Summary Save as draft

Requisition Number R0048669

Ellucian Company, LP (M02953124)  
2003 Edmund Halley Dr Ste 500  
Reston VA 20191-1108

Commodities (2)

|                                                  |               |
|--------------------------------------------------|---------------|
| Computer-Hardware-CPU 2w*1w (CP120)              | 625.00        |
| Quantity 1.00 @ 625.0000                         | Discount 0.00 |
| Additional Charges 0.00                          | Tax 0.00      |
| Service-Information Management System 4w (SE420) | 120.00        |

Grand Total - All Commodities 745.00

Grand Total - All Accounting 0.00

Back Add Accounting View as PDF Submit Requisition

6. Click **Add Accounting** to continue to charge the item(s) to the budget/FOAPAL. The page refreshes with the required fields for accounting information.

Back Add Accounting

Charge \$625 for item/commodity code CP120 over to account code 73212, click **Split Accounting** to continue.

Charge \$120 for service item/commodity code SE420 to 73403, click **Save**.

The page refreshes with the item(s) added and its corresponding Funding (FOAPAL). You can click any commodity or funding item in the list to view its details or make changes.

To add multiple FOAPAL lines, select **Split Accounting** and repeat steps.

Attachments Delete Requisition

Requisition Summary Save as draft

Requisition Number R0048707

Ellucian Company, LP (M02953124)  
2003 Edmund Halley Dr Ste 500  
Reston VA 20191-1108

Commodities (2)

|                                                  |               |
|--------------------------------------------------|---------------|
| cp120 (FR110)                                    | 625.00        |
| Quantity 1.00 @ 625.0000                         | Discount 0.00 |
| Additional Charges 0.00                          | Tax 0.00      |
| Service-Information Management System 4w (SE420) | 120.00        |

Funding 100%

1 Requestor Information
2 Vendor Information
3 Add Item & Accounting

Requisition Number (R0055439)
Currency USD

Chart \*
Index

U MISSOURI STAT... x v
Choose Index x v

Fund \*

A02000 OPERATING-SPRINGFIELD x v

Organization \*

052004 PROCUREMENT SERVICES x v

Account \*

73212 SUP-OFFICE x v

Program \*
Activity

011 ON-CAMPUS I... x v
Choose Activity x v

Location
Project

Choose Location x v
Choose Project x v

Distribution Amount \*
Distribution Percent \*

3.00
100.00000000

Distribution Total

3

Remaining

0

Delete Accounting

Back
Save

|                                  |               |                    |
|----------------------------------|---------------|--------------------|
| Attachments                      |               | Delete Requisition |
| Requisition Summary              |               | Save as draft      |
| Requisition Number               |               | R0048707           |
| Ellucian Company, LP (M02953124) |               |                    |
| 2003 Edmund Halley Dr Ste 500    |               |                    |
| Reston VA 20191-1108             |               |                    |
| Commodities (2)                  |               |                    |
| cp120 (FR110)                    | 625.00        |                    |
| Quantity 1.00 @ 625.0000         | Discount 0.00 |                    |
| Additional Charges 0.00          | Tax 0.00      |                    |
| Service-Information              | 120.00        |                    |
| Management System 4w (SE420)     |               |                    |
| Funding                          | Amount        |                    |
| U-A02000-052000-73212-062        | 625.00        |                    |
| U-A02000-052000-73403-062        | 120.00        |                    |
| Accounting Total                 | 745.00        |                    |
| Commodity Total                  | 745.00        |                    |
| Balanced                         | 100%          |                    |

## 7. Attach Supporting Document for Requisition.

Select Attachments in the upper-right corner and follow the prompts to upload the supporting documents. Attach the backup documentation in SSB9 so that Financial Services and Procurement Services can process the requisition.

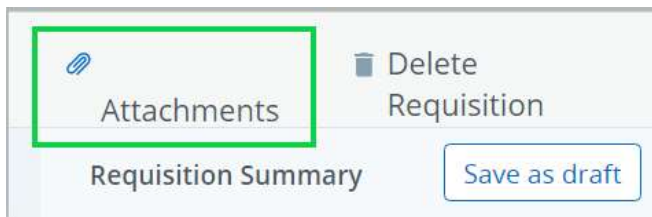
Attach all applicable documents, such as:

- Invoices
- Quotes
- Contracts
- SFS forms
- The prior-year Purchase Order for an annual encumbrance. Do not attach the prior-year invoice.

Each invoice must include:

- Remit address
- Invoice number
- Invoice date
- Amount due
- Invoices must be in U.S. dollars.
- Each invoice must state the exact amount to be paid. Partial payment of an invoice total is not permitted.

Click **Attachments**



Click **Attach File**



Click **Choose File** button to select your supporting document to upload. **PDF is Required**. Click **Upload**. It will attach the document to your requisition. **Document Type MUST ALWAYS be REQUISITION** before you upload. File size must be smaller than 10MB/10000 KB or the document will be rejected and will not upload.

Attach Documents

File Path: \*

Choose File

No file chosen

Document Type: \*

REQUISITION, Requisition

Cancel

Upload

Once uploaded successfully, you will be able to view the attachment or **delete** to start over.

| Attachments                                                                                            |               |              |                    |             |
|--------------------------------------------------------------------------------------------------------|---------------|--------------|--------------------|-------------|
| Requisition Number R0048707                                                                            |               |              |                    |             |
| <div> <div>Attachments</div> <div> <div>Attach File</div> <div>Refresh Attachments</div> </div> </div> |               |              |                    |             |
| Document Name                                                                                          | Document Type | Owner Name   | Date of Attachment |             |
| MONITOR5.PDF                                                                                           | REQUISITION   | XIAOMIN ZHOU | 08/03/2022         | <div></div> |

## 8. Submit Requisition

Click **Submit Requisition** to submit your requisition for approval; or click on **Save as draft** if you want to return to the requisition to make changes before submitting.

Requisition Summary

Save as draft

Requisition Number

R0048707

Ellucian Company, LP (M02953124)

2003 Edmund Halley Dr Ste 500

Reston VA 20191-1108

Commodities (2)

cp120 (FR110)

625.00

Quantity 1.00 @ 625.0000

Discount 0.00

Additional Charges 0.00

Tax 0.00

Service-Information

Management System 4w (SE420)

120.00

Funding

100%

Grand Total - All Commodities

745.00

Grand Total - All Accounting

745.00

View as PDF

Submit Requisition

You will receive a (green) message if requisition was submitted successfully.

Requisition R0048707 completed successfully

Search Requisition

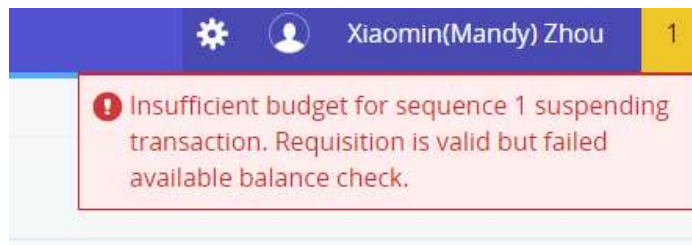
Create Requisition

Submitted requisition will be under **Pending Requisitions** waiting for approval.

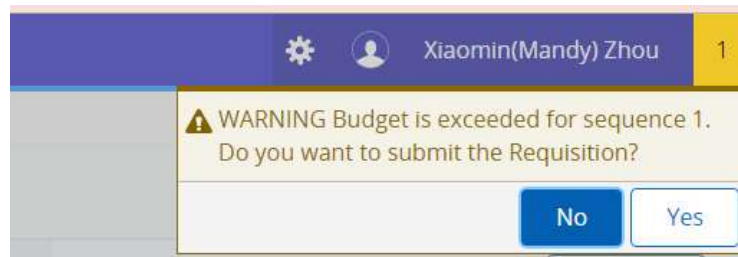
| Pending Requisitions 1 |            |                      |          |               |
|------------------------|------------|----------------------|----------|---------------|
| R0048707               | 07/29/2022 | Ellucian Company, LP | \$745.00 | In Approval ⓘ |

If you receive the message below (red) when submitting your requisition, it means there is not enough budget to cover the requisition expense so please use a different budget (fund-org) or contact your cost center budget analyst for help if you must use this budget.

<https://www.missouristate.edu/FinancialServices/yourbudgetanalyst.htm>



If you receive the message below (yellow) when submitting your requisition, you can click 'Yes' to complete the requisition.



If you are getting any other error message during the process of creating a requisition, please contact [BannerFinance@missouristate.edu](mailto:BannerFinance@missouristate.edu) for assistance.

## Part III – Checking Requisition Approval

After successfully submitting a requisition, you have the option to check the [Budget Access by Budget Access by Fund and Organization](#). This report allows you to review who will be approving your requisition by entering the Fund and Organization details. In Banner Finance, the approval structure is configured exclusively based on the Fund and Organization code, regardless of the account or program code used in the requisition. All approval queues are established based on departmental requests or needs.

Requisition approval follows specific scenarios:

- **Single Approval Scenario (90% of queues):** If there are multiple approvers in the same approval queue with the same approval amount, only one person's approval is required. This single approval covers the entire requisition.

| Approver_Name | Approval_Limit     | Next_Q | Next_Approver |
|---------------|--------------------|--------|---------------|
| [REDACTED]    | \$9,999,999,999.98 | --     | --            |
| [REDACTED]    | \$9,999,999,999.98 | --     | --            |
| [REDACTED]    | \$9,999,999,999.98 | --     | --            |
| [REDACTED]    | \$9,999,999,999.98 | --     | --            |

- **Multiple Approval Scenario (Around 6% of queues):** When the approval queue has different limits, requisition approval depends on the requisition amount.

Example:

For requisitions below or equal to \$3,000, a single approval from the green approver list is sufficient, as they are in the same approval level.

Requisitions exceeding \$3,000 require TWO approvals: one from the green approvers list and another from the orange approver list.

| ... | Approver_Name | Approval_Limit     | Next_Approver | Next_Queue |
|-----|---------------|--------------------|---------------|------------|
| ... |               | \$3,000.00         | --            | --         |
| ... |               | \$3,000.00         | --            | --         |
| ... |               | \$3,000.00         | --            | --         |
| ... |               | \$9,999,999,999.98 | --            | --         |

- **Next Approver Scenario (Very few queues):** If the approval queue has a Next Approver after, the requisition requires TWO approvals: one from the first queue (yellow), and another from the Next Approver queue (green). This setup is applied in a very small percentage of approval queues.

| Approver_Name | Approval_Limit     | Next_Approver | Next_Queue |
|---------------|--------------------|---------------|------------|
|               | \$9,999,999,999.98 |               | GIS6       |
|               | \$9,999,999,999.98 |               | GIS6       |

#### **Additional Tips for Requisition Approval:**

**Email Notifications:** There is no automatic email notification to Approvers when a requisition is submitted due to the setup implemented during the initial implementation of Banner. The rationale is to avoid potential confusion among Approvers, especially in cases with multiple Approvers in a single approval queue. To ensure timely action, it's recommended to send a message to your Approver, informing them that your requisition is awaiting approval.

**Denying/Rejecting a Requisition:** In the event of a requisition being denied/rejected, the Approver is required to compose a denial message. This message will be sent to the originator/initiator of the requisition, allowing them to correct the information and resubmit or delete the requisition if necessary.

**Final Validation Approval:** All requisitions approved by departments, as per the situations mentioned above, must undergo a Final Validation Approval queue in Financial Services. This validation ensures that expenses are charged to the correct accounting account or program codes.

**Mixed Fund-Organization (Budgets) Requisitions:** In cases where mixed fund-organization (budgets) are used in a requisition, requiring approval from different departments, Approvers are advised to use the 'All documents User may approve' option when approving documents/requisitions.

## Part IV - Other Features in My Requisition Dashboard

My Requisition Dashboard has three queues: Draft Requisitions, Pending Requisitions (awaiting approval) and Completed Requisitions.

- Requisition can be saved as Draft if you want to return to the requisition before you submit the requisition for approval. You can edit any requisitions in Draft status.
- You can Recall **Requisition** in Pending Queue if it has no approval records yet.

To make a change of a requisition in Pending Queue, you must recall the requisition first. Click on the requisition from Pending queue and click on recall requisition on the upper right corner to recall. Once requisition recalled, it will go back to Draft Queue where you can edit or make change.

- You can **Delete** any requisition that is in Draft Status. If you have attached documents to your requisition, delete requisition will delete associated attachment(s) too. This is a defect fix from 2023's Q3 upgrade.
- **Disapproved Requisition, if not needed, must be deleted** or it would encumber funds and affect the balance available for use. Disapproved requisition is under Draft Requisition queue where you must delete to disencumber the funds.
- You can **copy a completed requisition** and use it as a template for a new requisition. To copy a requisition, pick a requisition from your Completed Requisition queue, click on it to open this requisition, and then click on **Copy Requisition** on the upper right corner to make a copy.
- [View Document](#) allows you to track your requisition through the approval process. You can also see when a PO is issued and when an invoice is paid (except for orders with Dell)